

Maryland Office on Aging

Housing: Multi-Family Senior Assisted Housing

Agency		Division
Item No.	Description	Retention
1	<u>MULTI-FAMILY CERTIFIED MODEL FILES</u> A file folder is maintained for each certified Senior Assisted Housing multi-family facility. Files contain fully executed contracts, related correspondence such as letters, quarterly reports, draw down sheets, budgets, financial statements, etc. Files for each multi-family contractor are prepared on a yearly basis.	Retain for 5 years then destroy
2	<u>MULTI-FAMILY PROVIDERS FILES:</u> A file folder is maintained for each provider of multi-family Senior Assisted Housing facility. A file folder includes the annual budget, service agreement quarterly reports of subsidies earned, audit report and related correspondence. A new file for each fiscal year.	Retain for 5 years then destroy
XXXXXXXXXX LAST ITEM XXXXXXXXXXXX		

Schedule Approved by Department, Agency
or Division Representative7/26/90
Date

Signature

Dep. Dir.
Title

Schedule Authorized by:

8/21/90
Date

Signature

INSTRUCTIONS--TYPE OR PRINT A SEPARATE FORM FOR EACH NEW OR REVISED RECORD SERIES. FORWARD WITH RECORDS RETENTION SCHEDULE (GS 550-1)

DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
7275 WATERLOO ROAD
P.O. BOX 275
JESSUP, MARYLAND 20794

AGENCY RECORDS INVENTORY

PAGE 1 OF 2

1. DEPARTMENT/AGENCY

Office on Aging

2. DIVISION

Housing

3. UNIT Multi-Family
Senior Assisted Housing

DEFINITION-RECORD SERIES. A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE

Multi-family Certified Model Files

5. EARLIEST YEAR/LATEST YEAR

1977 TO 1990

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

A file folder is maintained for each certified Senior Assisted Housing multi-family facility. Files contain fully executed contracts, related correspondence such as letters, quarterly reports, draw down sheets, budgets, financial statements, etc. Files for each Multi-Family contractor are prepared on a yearly basis.

7. RECORD SERIES FORMAT(S)

- ☐ LETTER SIZE ☐ MICROFILM
☒ LEGAL SIZE ☐ COMPUTER TAPE
☐ BOUND BOOK ☐ FLOPPY DISK
☐ AUDIO TAPE ☐ VIDEO TAPE
☐ OTHER(SPECIFY)

8. RECORD SERIES SEQUENCE

- ☐ ALPHABETICAL
☐ NUMERICAL
☒ CHRONOLOGICAL
☒ GEOGRAPHICAL By County
☐ OTHER(SPECIFY)

9. VOLUME

- ☐ FILE DRAWER(S)
☐ MICROFILM REEL(S)
2 ☐ COMPUTER TAPE(S)
NUMBER ☐ OTHER(SPECIFY)

10. ANNUAL ACCUMULATION

- ☐ FILE DRAWER(S)
2 ☐ MICROFILM REEL(S)
NUMBER ☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)

11. FILE IS USED

- ☐ DAILY ☒ WEEKLY ☐ MONTHLY

12. FILE BECOMES INACTIVE AFTER

- 5 ☐ MONTH(S) ☒ YEAR(S)
NUMBER

13. CURRENT LOCATION(S) (BLDG., FLOOR, ROOM)

301 W. Preston Street
Room 1004

14. IS RECORD SERIES DUPLICATED ELSEWHERE?

- (IF YES, SPECIFY AGENCY OR OFFICE)
☐ YES ☒ NO

15. ACCESS RESTRICTIONS ☐ YES ☒ NO

(IF YES, CITE LAW(S) & REGULATION(S))

16. AUDIT REQUIREMENTS

- ☐ NONE ☒ STATE ☐ FEDERAL ☐ INDEPENDENT

17. IS AN INDEX SYSTEM USED? (IF YES, EXPLAIN BRIEFLY AND DESCRIBE ANY HARDWARE/SOFTWARE)

- ☐ YES ☒ NO

18. RECOMMENDED RETENTION

Retain for 5 years then destroy.

19. NAME AND TITLE OF PREPARER

Maralyn W. Washington

20. TELEPHONE NUMBER

225-1118

21. DATE

4/19/90

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DEFINITION-RECORD SERIES. A GROUP OF RELATED RECORDS NORMALLY FILED AND USED AS A UNIT FOR REFERENCE AS WELL AS RETENTION AND DISPOSITION PURPOSES

4. RECORD SERIES TITLE

Multi-family Providers Files

5. EARLIEST YEAR/LATEST YEAR

1988 TO 1990

6. RECORD SERIES DESCRIPTION (BRIEFLY DESCRIBE THE TYPES OF INFORMATION/DOCUMENTS/FORMS FOUND IN THE SERIES. INCLUDE THE PURPOSE OR FUNCTION OF THE SERIES)

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7. RECORD SERIES FORMAT(S)

- ☒ LETTER SIZE ☐ MICROFILM
☒ LEGAL SIZE ☐ COMPUTER TAPE
☐ BOUND BOOK ☐ FLOPPY DISK
☐ AUDIO TAPE ☐ VIDEO TAPE
☐ OTHER(SPECIFY)

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- ☒ ALPHABETICAL
☐ NUMERICAL
☐ CHRONOLOGICAL
☐ GEOGRAPHICAL
☐ OTHER(SPECIFY)

9. VOLUME

- ☒ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)

10. ANNUAL ACCUMULATION

- ☐ FILE DRAWER(S)
☐ MICROFILM REEL(S)
☐ COMPUTER TAPE(S)
☐ OTHER(SPECIFY)

11. FILE IS USED

- ☐ DAILY ☐ WEEKLY ☒ MONTHLY

12. FILE BECOMES INACTIVE AFTER

- 5 MONTH(S) ☐ MONTH(S) ☒ YEAR(S)

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☐ YES ☒ NO

15. ACCESS RESTRICTIONS ☐ YES ☒ NO
(IF YES, CITE LAW(S) & REGULATION(S))

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18. RECOMMENDED RETENTION

Retain for 5 days then destroy.

19. NAME AND TITLE OF PREPARER

Maralyn W. Washington

20. TELEPHONE NUMBER

225-1118

21. DATE

4/19/90